

College Investing Plan Automatic Contribution Services and Money Line® Form

Customer Information:

Participant's Name

Participant's Social Security or Tax I.D. Number

Participant's Account Number: 6 -

Beneficiary's Name

AUTOMATIC CONTRIBUTION SERVICES

Fidelity Automatic Account Builder (FAAB) and Money Line enable you to transfer money electronically to your College Investing Plan account. Use this form to sign up for Automatic Account Builder and/or Money Line. Either service will normally be active 10 business days after we receive this form. Please allow approximately 30 calendar days for the first transfer.

Your electronically transferred money will be invested according to the most recent investment allocation information on file for your account (as indicated on your Account Application or Investment Instructions Form).

Fidelity Automatic Account Builder, either from your bank account or your Fidelity brokerage or mutual fund account, lets you choose a monthly or quarterly date for automatic contributions to your College Investing Plan account. **Minimum contribution amount is \$15 monthly (\$45 quarterly). Please complete all three sections to add FAAB.**

If you would like to set up Money Line (without Automatic Account Builder), simply complete sections 1a and 3. Money Line allows you to make additional contributions via Electronic Fund Transfer (EFT) to your College Investing Plan account. Transfers occur only when you call to initiate them. **Note: Money Line is only available for transfers from your bank account to your College Investing Plan account** (internal transfers from your Fidelity brokerage account to your College Investing Plan account can be done online or by calling a representative.) The maximum Money Line purchase amount is \$50,000.

If your Automatic Account Builder or Money Line contributions cause you to exceed the maximum amount which may be contributed to your account, your Automatic Account Builder or Money Line option may be suspended and any over-contributions will be returned to your bank or Fidelity account. If either service is suspended due to over-contributions, please contact us for further information.

Return the completed form to Fidelity Investments College Plan Service Center, PO Box 770001, Cincinnati, OH 45277-0015. If you have any questions, call us anytime at **800-544-1914** or visit us at **Fidelity.com**.

1 WHERE IS THE MONEY COMING FROM?

A. From your bank - Money Line:

You may transfer money electronically from your bank or credit union into your College Investing Plan account using Money Line. Your bank or credit union must be a member of the Automated Clearing House.

Please attach a voided check from your checking, savings, or NOW/MDA account. Passbook savings accounts are **not** eligible. An identical name must appear on both your College Investing Plan account and your bank account.

Attach check here.

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|---|
| John Doe Sixty One Maple St. Anytown, MA 00000 |
| PAY TO THE ORDER OF VOID \$ _____ Dollars |
| First National Bank One Main Street, Anytown, MA 00000 |
| ⑆00002010⑆ 509779195 701 |

Bank Routing No.

1 WHERE IS THE MONEY COMING FROM? (CONTINUED)

B. From your Fidelity Account:

To set up automatic investments from your Fidelity brokerage or mutual fund account to your College Investing Plan account, at least one of the Social Security (or TIN) numbers must match the Participant SSN (or TIN) on your College Investing Plan account.

Contributions* will come from this Account Number:

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Fidelity Brokerage or Mutual Fund Account Number

NOTE: Only cash can be transferred into your College Investing Plan account. Transfers from your brokerage account or mutual fund account must either come from the Core account balance, or you must sell positions. If not coming from Core account please indicate Mutual Fund(s) to sell below. **Please note that money will be transferred from your bank prior to settlement of the designated portfolio(s). The amount transferred will be used to settle all periodic investments for that day.**

From:

Position(s) held in:

Percentages must total 100%

Mutual Fund Name:

Fund Code:

Percentage:

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*For Fidelity Portfolio Advisory ServicesSM and Fidelity Private Portfolio ServicesSM account, redemptions will be made across your model portfolio.

2 HOW OFTEN SHOULD THE MONEY MOVEMENTS OCCUR? FOR HOW MUCH?

Automatic Account Builder

Please indicate whether you are adding or changing your Automatic Account Builder information. Please allow approximately 10 days for the first transfer. **If your Account Builder Contributions cause you to exceed the maximum amount which may be contributed to your account, your FAAB option may be suspended and any over-contributions will be returned to your bank. If your Automatic Account Builder service is suspended due to over-contributions, please contact us for further information.**

☐ Adding Automatic Account Builder information ☐ Changing Automatic Account Builder information

Investment Information

1. Frequency:

☐ Monthly (\$15 minimum) ☐ Quarterly (\$45 minimum)

Quarterly investments will be made in March, June, September, and December unless you call to specify otherwise.

2. Timing:

Transfer investments on ____ ____ day of the month). If no date is indicated, investments will be made on the 20th (monthly if no frequency is indicated).

3. Amount:

Transfer \$_____ dollar amount). If no amount is indicated, \$15 automatic monthly transfers will be made.

3 SIGNATURE

I hereby authorize and request Fidelity to secure payment of the amount indicated above to be invested by me by initiating debit entries to my account indicated in the bank named above ("bank") and I authorize and request the bank to accept any such debit entries initiated by Fidelity to such account and to credit, as requested, the same to my Fidelity account, without any further authorization relating hereto. I hereby ratify any instructions given pursuant to this authorization and agree that Fidelity will not be liable for any loss, liability, cost, or expense if it follows reasonable procedures designed to prevent unauthorized transactions. I understand that telephone calls to Fidelity may be recorded and I consent to such tape recordings.

PARTICIPANT'S SIGNATURE

Date _____



Smart move.®

College Plan Service Center
PO Box 770001, Cincinnati, OH 45277-0015
Fidelity Brokerage Services LLC,
Member NYSE, SIPC

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